

Facilitation Tools for Building Consensus and Moving to Action

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What We'll Cover

- Decide what to accomplish in a meeting
- Ask a good question
- Evaluate if the meeting was successful—so you can improve it next time



**What are you
facilitating?**



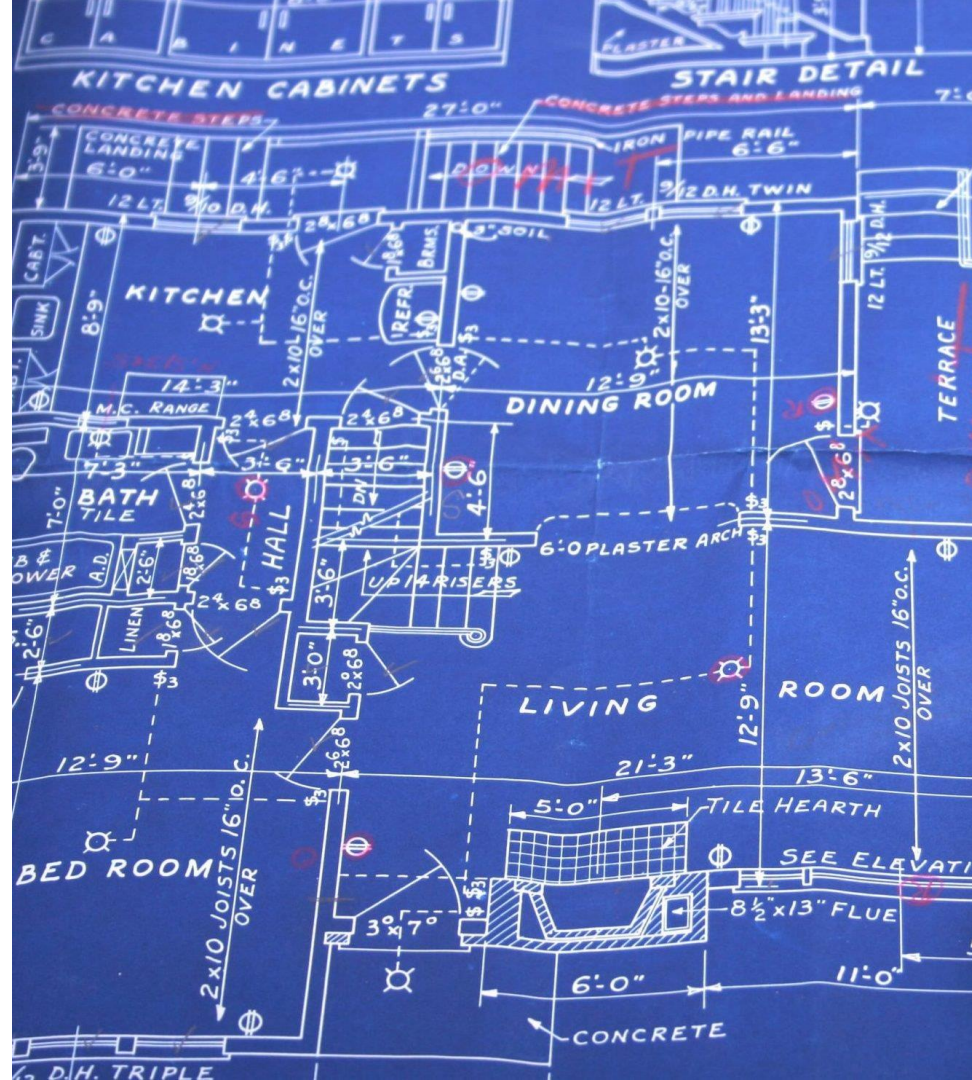
A Facilitator Has Many Jobs

- Move the group to action
- Bring forth peoples' best contributions
- Create a space where people feel important to the effort
- Build clarity
- Lead the group to take a step toward the shared aim



Facilitation Tool #1:

Meeting Objectives



Two Types of Meeting Objectives

Rational Objectives

What you want to achieve
by the end of the meeting

Experiential Objectives

How you want them to feel
by the end of the meeting



Sample Rational Objectives

Framing: By the end of this meeting, participants will...

- Revise work plan for June
- Interpret survey data
- Decide on three candidates to interview
- Design a PDSA cycle
- Prioritize problems to solve in Q2



Sample Experiential Objectives

Framing: During this meeting, participants will...

- Feel safe sharing feedback
- Grow confidence in the team's plan
- Leave with clarity about their individual action steps
- Focus on what's important—not what's urgent
- Stoke urgency about the goal



Preparing Meeting Objectives

- You're unlikely to accomplish more than 2-3 rational objectives

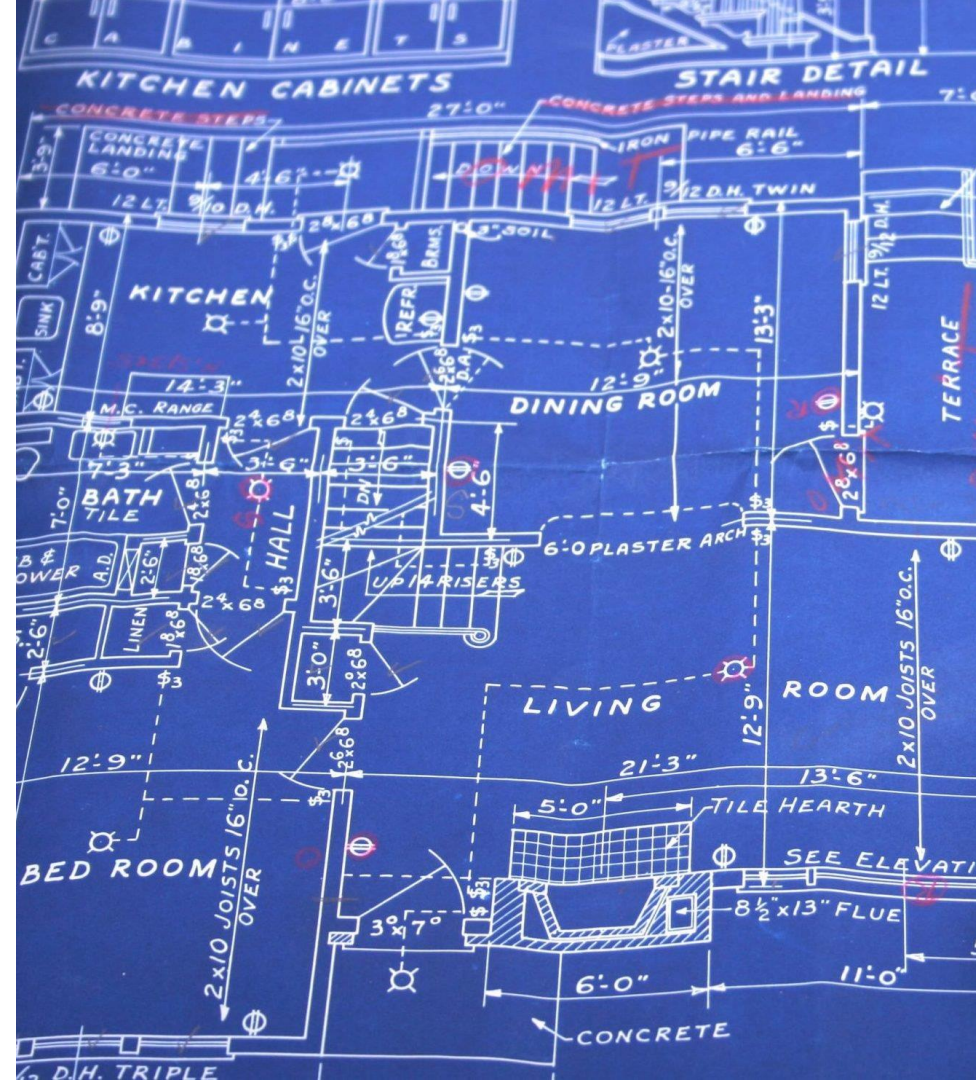
If you have more than 3, do you need multiple meetings? Can you cover some pieces asynchronously?

- Rule of thumb: 1 minute of meeting time = 1 minute of prep time
- Fewer people makes for faster decisions. Refine your invitation list. Is everyone there poised to take action?



Capture your thinking

For your next
meeting,
jot down a rational
objective and an
experiential objective



Facilitation Tool #2:

Focused Questions



Magic Trick for Leading a Conversation

- O
- R
- I
- D



Magic Trick for Leading a Conversation

- **Observe**
- **Respond**
- **Interpret**
- **Decide**



ORID: Observe

- What was one detail—an image, a word—that jumped out?
- How would you summarize it?
- What were the main points you heard?

Don't rush to “make meaning”—we'll get there!



ORID: Respond

- How do you feel about it?
- What was the high point? The low point?
- Does it remind you of anything?
- How did the team react?

Invite people to share their personal connections



ORID: Interpret

- What can we learn from it?
- What is the most important part?
- What root causes are operating underneath what we're seeing?
- What data or analysis would help us understand it better?

Connect dots between concepts



ORID: Decide

- What can we test by Tuesday?
- What's the most obvious action we should take?
- How is this changing your thinking?
- Who can help us take action—and who will reach out to them?

End with actions, or else it's all theoretical! Encourage specificity



Try it with a partner

Partner 1: Use the ORID sequence to ask four questions about the CHILA

Partner 2: Give feedback on how well the questions fit the ORID framework

Then switch



Facilitation Tool #3:

Measure Your
Effectiveness





email



Meetings should
produce something





*Use your
objectives!*

**Decide what your meeting
should produce, then count it**



Sample Measures for a Meeting

Objectives

- Decide action steps for clients
- Increase number of providers who participate
- Improve coordination between providers

% of clients for whom
we committed to
a new action step

of meeting attendees
who volunteered to
perform a task
this week

% of attendees
who talked



	May 1	May 8	May 15
% of clients with an action step			
# of meeting attendees w/a task			
% of meeting attendees who talked			

Use simple data collection



	May 1	May 8	May 15
% of clients with an action step	4	5	10
# of meeting attendees w/a task	5	5	9
% of meeting attendees who talked	40	50	50

	May 1	May 8	May 15
% of clients with an action step	4	5	10
# of meeting attendees w/a task	5	5	9
% of meeting attendees who talked	40	50	50
# of clients rehoused	2	3	2

↪ *Compare process measures to results*



What will you count to measure your meeting's success?

- Write 2-3 measures for your meeting
- Refer back at your objectives



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